

CIPLA - Nothing New – As Expected

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Abstracts

Cipla's Q4 FY12 result was below our estimate largely because of lower than estimated sales from Lexapro formulations. EBITDA margin remained flat despite increase in sales from Indore facility and 'some' sales from generic Lexapro formulations. This may be due to the continuing 'rationalization' of various partnerships in different geographies. Launch of Dymista and Vancomycin by Cipla's partners in US too may not fetch any meaningful upside in the near term. We reiterate our Market Perform on Cipla but change our target price to `341 as we rollover to FY13 EPS.

Contents

COMPANIES MENTIONED

Cipla

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